



# NEW BOARD ORIENTATION FOR NEIGHBORHOOD ORGANIZATIONS

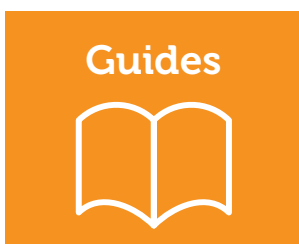




Our City strives to meet the needs of all residents who choose to call Orlando home. To do this, I have made it a priority for the Neighborhood Relations team to organize, support, mentor and guide residents and neighborhood organizations in their effort to keep Orlando a great place to live, work and play. In 2014, we launched iLead, a comprehensive neighborhood-training program that informs, connects and involves our neighborhood leaders through a series of interactive guides, videos, webinars and workshops. I encourage you to use the iLead program to build and sustain your successful neighborhood organization.

A handwritten signature in white ink that reads 'Buddy Dyer'.

Orlando Mayor Buddy Dyer



- Board Orientation and Operations
- Communication Tools
- Effective Meetings
- Engaging the Next Generation of Leaders
- Event Planning
- Ice Breakers
- Leadership Skills
- Neighborhood Grants
- Parliamentary Procedures made Simple
- Writing Your Neighborhood History

ILEAD is a comprehensive program that provides you with the tools to inform, connect and involve your neighbors through a series of guides, videos, webinars and workshops. These tools cover topics such as how to effectively hold meetings, how to utilize a variety of communication tools and how to engage the next generation of leaders. Whether you download a guide, view a video, participate in a webinar or attend a workshop, iLead is your one stop shop for online leadership training.



**KNOWLEDGE** is one of the most powerful tools a neighborhood organization should cultivate among its members, especially its board of directors. A board orientation provides board members with the **INFORMATION** needed to perform their duties for the neighborhood organization. It is important for new board members to **UNDERSTAND THEIR ROLE**, the role of the board, the expectations that the board has and the association's governing documents and rules.



### WHY AN ORIENTATION?



A thorough board orientation helps your new directors or officers become engaged in the work of the association and will contribute to the director's feeling that their time is going to be well spent. When done right, an orientation can be motivational and function as a building block to an organization's effectiveness and achievements. It also helps build a working relationship among all the board members.

In addition to having a formal board orientation, you may want to consider creating an orientation for your committee chairs and members. All the information in this guide may easily be adapted for committee orientations.

### QUESTIONS TO ADDRESS

Use your orientation as an opportunity for new board members to find answers to critical questions, such as:

1. What skills and knowledge does each board member bring to the table?
2. What do board members need to know and learn about serving and operating the association?
3. How will the directors and officers function as a board?
4. What resources are available to help fulfill board members' roles and responsibilities to the association and its members?
5. How does the board run board and membership meetings?
6. If the board requires outside advice on legal, planning and financial matters, who makes this happen?
7. What is the association's annual budget and how are its fiscal responsibilities handled?

What other questions do you feel your association's board orientation should address?  
Ask your other board members their thoughts.



Your board member orientation is never a one-time occurrence, it is an **ONGOING PROCESS**. Orientation begins when you are recruiting new directors and continues after a new director's first board meeting. Keep in mind that you may also use this information for new committee member orientations too; all you will need to do is to change the focus to **CONCENTRATE ON THE ROLE** and expectations of the committees.



### COMPONENTS OF A BOARD ORIENTATION

New board members need to feel like they're an integral part of the board as soon as possible. An orientation, conducted soon after the elections, will help everybody feel at ease and work more effectively as a board.

The following are some basic building blocks for your board orientation. This information is not meant to be all-inclusive, but an outline that your association may tailor to fit your association needs.

#### BOARD NOTEBOOK

A board notebook is essential for all board members. This notebook is a reference guide and needs to include all the information, contacts and documents that are important for board work and operating the association. It gives all the members the same information in an organized manner. This notebook can be maintained in an electronic format by saving it on a CD or posting it on your association's website. If posting the notebook on your website, you may want to restrict access to board members only.

Examples of the sections of a board notebook are:

##### GENERAL

- Association purpose
- Goals & objectives
- Board roster with contact info
- Board and officer job descriptions
- Calendar of meetings
- Number of homes and members
- Board norms & rules

##### LEGAL

- Articles of incorporation
- Bylaws
- Covenants & deed restrictions (mandatory associations)
- Policies
- Procedures
- IRS non-profit determination letter (if applicable)
- Insurance policies

##### FINANCIAL

- Budget
- Financial reports
- Annual audit (if applicable)
- Insurance information
- Sales tax exemption certificate (if a 501(c)(3) organization)
- Contracts – (if applicable, such as property management company, landscaping, pool service, etc)

##### MEETINGS

- Agendas
- Minutes
- Annual meeting minutes

##### COMMITTEE SECTION

- List of committees, responsibilities, projects and rosters
- Reports
- Minutes

##### MISCELLANEOUS

- Any other pertinent information





### SETTING BOARD NORMS & EXPECTATIONS

The City encourages your board to set and/or reconfirm board rules and customs or “norms” annually. Norms are the rules each board member agrees to operate by in order to complete the business of the association. Norms should be developed with input from all the board members and voted on at the beginning of each new fiscal year or election. Here are sample norms:

- Agenda and board materials to be distributed to each board member at least 48 hours prior to the meeting.
- A board member is responsible for notifying the chair/president or secretary at least 24 hours in advance of the meeting if they are unable to attend the meeting or need to leave the meeting early.
- Arrive 5-10 minutes before the start of the meeting and be prepared to start the meeting at the time posted.
- Come prepared to conduct business, which means reviewing any written information prior to the meeting.
- Follow the agenda, staying on topic and keeping remarks focused on the business and not the person – no negative comments directed to individual board members.
- Meetings will be no longer than 1.5 hours.
- No smoking or alcoholic beverages during the meeting.
- Wait to be recognized by the president before speaking.
- Be respectful and civil to each other; mean what you say and say what you mean.
- Once a vote has been completed, need to publicly support the decision.
- Follow Robert’s Rules of Order (Newly Revised, 11th Edition).

### WHEN SETTING UP ORIENTATIONS, CONSIDER:



- **Selecting a date, time and location conducive for the orientation and completing before the first board or committee meeting.**
- **Conducting an orientation for board members and one for committee members based on information needs.**
- **Distributing written material in advance and encouraging the members to review the material.**
- **Providing name tags and/or table tent cards (if appropriate).**
- **Keeping orientation to a maximum of 1.5 hours.**

Once the board has set and approved its norms, it will be easier to address members that may violate the norms. Consider copying the norms on the back on the meeting agenda or posting them in plain view at the meeting as a gentle reminder about the norms the board adopted.



In planning your orientation, keep in mind that the **EXPERIENCE LEVELS** of board members will vary greatly. Some will have served on previous association boards or committees – some will have not. Levels of interest and expertise will also differ.



### SAMPLE ORIENTATION

#### HERE ARE SOME KEY ASPECTS TO CONSIDER AS PART OF THE BOARD ORIENTATION:

- Determine which board members will conduct the orientation; consider assigning the seasoned board members to conduct different parts of the orientation. By engaging the existing board member in the orientation, you are enabling the new and existing board members to get to know each other.
- Hold a meeting with the board chairperson / president and new board members. The purpose of the meeting is to set the standard for conduct and achievement required from board members, as well as highlighting the vision and priorities of the association.
- Have new board or committee members introduce themselves and share their interests, skills and abilities – what they hope to offer the association and what they hope to gain as board members.
- Provide some of the history and evolution of the organization and review interim and long term goals.
- Bring members up-to-speed on issues and challenges facing the association/neighborhood and discuss any key trends that could impact and affect the association.
- Provide board or committee members with information on association policies and procedures, etc.
- Outline roles and responsibilities of the board.
- Consider incorporating teambuilding exercises for the board as part of the orientation process.

### QUESTIONS TO CONSIDER WHEN RECRUITING



- Why does our neighborhood organization want to recruit more volunteers?
- What role do volunteers currently play in the organization and what role could they have?
- What are barriers to volunteers participating with your organization?
- Do we offer new and challenging opportunities that utilize technology?
- Do we provide opportunities for volunteers to learn?
- Do we allow volunteers to be creative with projects and empower them to make decisions?
- Do we provide various options and flexibility to get a task completed by focusing on the end result?
- Is volunteering with your neighborhood organization fun?



## SAMPLE BOARD ORIENTATION CHECKLIST

Here are items to consider when developing your orientation session for new board members. This information will help build a team and educate the new board members about the association and their specific roles. This check list is to serve a guide and should be tailored to meet your association board's needs.

### PROVIDE GENERAL INFORMATION

- History of the association, highlight the key historical events & facts
- Association boundaries, number of homes, number of members
- Board & committee structure
- Copy of articles of incorporation (if incorporated by the State of Florida) by-laws and covenants & deed restrictions (if applicable)
- Priorities, goals and objectives
- Contact information for board members and committee chairs/members
- Property management company contact information & copy of contract (if applicable)
- Contact information for the City of Orlando Office of Communications & Neighborhood Relations

### ROLES AND RESPONSIBILITIES

- Reviewed board member's role
- Reviewed officers' role
- Reviewed committees and their roles
- Discussed expectations for and of new board members
- Discussed property manager's role, contract and procedures
- Reviewed board norms & expectations

### POLICIES AND PROCEDURES

- Provided new members with board policies and procedures (if applicable)
- Reviewed board policies and procedures with new board members
- Reviewed bylaws, covenants & deed restrictions and rules
- Reviewed committee procedures/rules

### FINANCIAL MANAGEMENT

- Discussed budget process
- Provided current year's budget
- Reviewed current financial condition of association
- Reviewed expense/payment procedures, including allowable expenses and who signs checks
- Reviewed board reimbursement rules/procedures

### OTHER INFORMATION

- Provided copies of minutes from previous board and membership meetings (past 12 months)
- Reviewed association website and social media sites, including what and how information is posted (if applicable)
- Ask new members to "like" and "follow" the association in social media

### WHAT OTHER ASSOCIATION INFORMATION IS THERE TO COVER?

- \_\_\_\_\_
- \_\_\_\_\_





## SAMPLE AGENDA

### I. INTRODUCE EVERYONE

- Elected chairperson / president
- Executive officers
- Other board members
- Team building exercise

### II. DESCRIBE THE ASSOCIATION

- Purpose, mission and vision
- Membership (number, boundaries, etc.)
- Goals, plans and priorities
- Accomplishments & challenges
- Overview of programs and services
- Overview of current issues and/or concerns

### III. EXPLAIN AND DISCUSS

- Board policies & procedures (meeting attendance, voting, etc.)
- Meeting attendance requirements--both board and committee
- Set/review/update board norms/expectations
- Committee assignments and charges
- Board role and relation to property manager (mandatory associations)

### IV. REVIEW ASSOCIATION DOCUMENTS

- Bylaws
- Covenants/deed restrictions (mandatory associations)
- Rules
- Board norms/expectation
- Financial management
- Other information

### V. COLLECT DATA AT THE MEETING

- Addresses
- Telephone--home and office
- Fax number
- E-mail address
- Best time to contact
- Best time for meetings



## LEADERSHIP SUGGESTIONS

Here are some suggestions that can create effective leadership and boards:

**CONFIDENCE:** Confidence in yourself, confidence in others, confidence in your cause, confidence in your neighborhood.

**OPTIMISM:** A belief that the goal is not only good, but also that it will be reached. Show a “can do” attitude!

**KNOWLEDGE:** An understanding of the underlying problems, what needs to be done and how to go about getting it done.

**DECISIVENESS:** The ability to weigh options, make decisions and gain the acceptance of your neighbors.

**OPENNESS:** A respect for the opinions of all and a desire to work with people of divergent views and personalities. It's okay to disagree, but don't be disagreeable in your words and actions.

**SHARING:** A willingness to help with even menial tasks, to be out in front and to support the members of the group in their endeavors.

**PATIENCE:** The willingness to let ideas ripen, to plan adequately, and to wait the right time for action.

**COURAGE:** The courage to withstand criticism, to make sacrifices, to resist pressure and to continue in the face of adversity.

**COMMUNICATION:** The ability to understand what others are trying to say and to convey decisions and action plans clearly.

**LEADERSHIP:** Occasionally demands a lot of other things, too. It never comes cheap. Remember to lead by example.



### GOAL SETTING

#### BE AWARE OF NEIGHBORHOOD NEEDS

Through the process of setting goals for your neighborhood organization, the needs of your neighborhood will come into focus. These needs give your organization a purpose and meaning.

#### ACHIEVE YOUR PROJECTS

By setting time limits for when you want to finish a project, your organization can anticipate how much work is ahead and set its schedule accordingly.

#### STRIVE TOWARD A MARK

Goal setting keeps your members enthused and motivated. If your association has set a target date to complete a project, then the energy level of members will increase as that target date draws nearer.

#### KEEP MEMBERS ACTIVE

If your organization has set goals, there will be plenty of projects. If the members of the organization are not busy, then it's time to get them working to accomplish your existing goals or set new ones. An added benefit is that goals may help maintain member interest and participation in the association.

#### THE ASSOCIATION WILL GROW AS LONG AS THE BOARD...

- Sets goals and keeps the process moving to make your neighborhood a better place to live.
- Continues to motivate your neighbors to be involved in the association's goal setting and completion of projects and social events.
- Uses the resources available through your neighborhood outreach coordinator to obtain speakers for meetings.
- Keeps communications open to all neighbors through newsletters, flyers and ideally a web site.
- Gets involved in City government.
- Involves members and neighborhood residents in discussions, committees, special events and projects as much as possible.
- Staggers terms of board members to ensure growth and continuity



## SMART

### SETTING GOALS THE 'SMART' WAY

**S**PECIFIC  
Goals should be simply written and clearly defined. (What, Why and How)

**M**EASURABLE  
Goals should be measurable with evidence that you have accomplished the goal.

**A**CHIEVABLE  
Goals should be achievable; they should stretch you slightly so you feel challenged, but defined well enough so that you can achieve them.

**R**EALISTIC  
Goals should measure outcomes, not activities.

**T**IME FRAME  
Goals should be linked to a time frame that creates a sense of urgency, or results in tension between the current reality and the vision of the goal. For example, By December 31, 2013 the ABC Association will increase its paid membership by 5%.

# NOTES

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## STAY INFORMED, CONNECTED AND INVOLVED

### NEIGHBORHOOD NEWS

Events, information and helpful resources to share with your neighborhood straight to your inbox! Subscribe at [cityoforlando.net/neighborhoodnews](http://cityoforlando.net/neighborhoodnews)

### NEIGHBORHOOD RELATIONS FACEBOOK

Like us at [facebook.com/orlandoneighborhoodrelations](https://facebook.com/orlandoneighborhoodrelations)

### NEIGHBORHOOD RELATIONS NEXTDOOR

Sign up at [nextdoor.com](http://nextdoor.com) to receive important information that effects your neighborhood.

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